6 Steps to Case Study Success (and Tips on How to Extract the Most Value from Them)

Customer case studies can go a long way toward convincing prospects of the value of your company, solution, or service. Here are six sure-fire steps for effectively producing hard-hitting case studies.

Marketers know that well-written case studies play an important role in moving prospects along in the decision process. After all, case studies illustrate the real-world results that prospects want to see. Creating an efficient process for developing case studies is critical to maximizing your productivity, making sure you don't waste your customers' time, and telling the most compelling story possible.

1. Make sure you have a story to tell.

Once someone nominates a customer for a case study, find out whether or not there's a story worth sharing. The fact is that not all customer situations translate into an interesting story (or one that will nudge prospects along in the sales cycle). One suggestion is to create a backgrounder form to be filled out by anyone suggesting a case study candidate. At a minimum, you should gather the following information:

Do your homework once someone nominates a case study candidate

- An overview of the customer's organization, including industry, revenues, and company size
- Date the customer went live with the solution or took advantage of the service (if this date was recent, the customer might not yet have enough results to share)
- The name, contact information, and role of the person(s) to be interviewed (if these are all technical contacts and you're trying to uncover business results, you might need to ask for additional contacts)
- Proof points to demonstrate the value of the solution/service (if these are lacking – or if the customer isn't willing to share them – your story will largely be anecdotal and won't pack as much punch)

- Aspects of the engagement that should be highlighted in the story (for instance, was the implementation timeframe unusually short?)

2. Determine the value of the story.

Figure out how the story will help your sales force

While it never hurts to publish lots of case studies, you want to focus your efforts on the ones that will serve you best. Once you understand the basic customer situation, compare it to your existing library of case studies. Some considerations include the following:

- Will this story complement the list or will it be largely redundant?
- Will it help round out examples of customers in a certain industry?
- Is the customer a brand name that we want to tout?
- Is the customer engaged in a market that our company is trying to penetrate?
- Will the story highlight a solution or service that needs more visibility?
- Are the proof points different from those in other stories?

3. Get the customer's buy-in.

Make sure you'll be able to publish the story

If the story looks promising, make sure the customer is not only willing to be interviewed and to share ROI metrics, but that he or she has the green light to participate in a case study. It's wonderful to have an enthusiastic advocate within the customer's organization. But if the customer's marketing or legal department is not open to going public with details, there's no sense pursuing the story.

4. Prepare the customer.

Help your customer get ready for the interview by providing questions ahead of time

There's a lot to be said for the element of spontaneity in an interview. After all, the most engaging stories are based on first-hand interviews and include plenty of customer quotes to move the story along. However, there's nothing more frustrating than starting an interview only to find out that the customer can't answer the questions.

To avoid this roadblock, send the customer a general set of questions ahead of time, perhaps as you're scheduling the interview time. This allows the customer to decide if he or she is the appropriate interviewee, and to make sure all information (such as ROI metrics) is in hand during the interview.

5. Nail the interview.
The interview can make or break a case study. After all, if you don't get enough information – and compelling details – your story will fall flat. The following tips will help you get the most out of an interview:

Gear up for the interview by conducting research and tailoring your questions

- Do a bit of research before interviewing the customer. Recent customer press releases, news coverage, or annual report details might inspire questions that help draw out a unique angle.
- Tailor the interview questions for the call. Not every question will apply to each customer situation so don't waste everyone's time asking irrelevant questions.
- Ask open-ended questions. Getting lots of "yes" and "no" answers makes it hard to tell a good story.
- Leave room to veer from the script. Some of the most interesting questions are prompted by the customer's responses to your original questions.

6. Set expectations.

Inform the customer of the review schedule and any additional information you'll need from them

If you can give the customer a general idea of when you'll be sending the case study draft – and also get their commitment to a fast review and approval – the entire process should go quickly and smoothly. Make sure to tell the customer of anything else you will need, such as a boilerplate company description and logo file.

Bonus: Get the most out of your case studies.
Don't forget to maximize the value of your case studies by repurposing them in as many ways as possible. The following are a few ideas:

- Shoot a customer video testimonial
- Excerpt customer quotes to include in white papers, presentations, and on relevant Web pages
- Pitch a customer story to a trade publication
- Distribute a press release touting the key results
- Offer case studies as giveaways at trade shows
- Highlight a story in your newsletter

- Ask the customer to speak at your user conference

Case Study Checklist

Here's a handy checklist that summarizes these steps. Happy storytelling!

Checklist for Case Study Success	
Did I collect background information about the customer/situation?	
Will this story add value to the case study library?	
Has the customer's marketing and/or legal department agreed to a case study being published?	
Did I research the customer on the Web?	
Have I tailored the interview questions?	
Have I sent a list of questions to the customer?	
Did I explain the case study process to the customer?	
Did I ask for the customer's boilerplate and logo?	
Am I using the case study in as many ways as possible?	

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